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EQUITY: INTERNET & NEW MEDIA

Monthly App Tracker – July 2026

Douyin becoming China's most used app; Bytedance portfolio dominates China's mobile internet space

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MAS rose 1.3% y-y and total monthly time spent increased 8.8% y-y in July

Monthly active smartphone (MAS) users in China rose 1.3% y-y to 1.28bn in July 2026. China's MAS has remained stable in recent months. Total monthly time spent (MTS) grew 8.8% y-y in July, accelerating slightly from 8.6% y-y growth in July 2026.

Douyin surpasses Weixin in monthly time spent for the first time; Bytedance' app portfolio commands over one-third of China's mobile time spent

According to Questmobile, Douyin (unlisted, owned by Bytedance (unlisted)) saw a 29% y-y increase in monthly time spent (MTS), surpassing Tencent's (700 HK, Buy) Weixin (up 3% y-y) to become China's most used app for the first time. Douyin's MTS growth was driven by a 19% increase in daily active users (DAU) and an 8% rise in daily time spent per DAU (DTSD). In contrast, Weixin's MTS growth was primarily due to a 3% y-y increase in DAU. Weixin remains China's largest app in terms of DAUs (931mn), compared to Douyin's 714mn.

Among China's top 20 most used apps in terms of monthly time spent, the entire Bytedance portfolio has five apps listed – Douyin, Douyin light version, Hongguo short drama (HG), Today's headline (news app), and Tomato free novel (TFN) – which commanded a combined time spent share of 35% in July. Tencent has four apps making it to the top 20 with a combined time spent share of 24%. In the past decade Bytedance has successfully navigated shifting users' tastes, evolving its content portfolio from news, short videos, free novels, music streaming to short dramas. It has now become a leader in literally all of the content categories, bar online gaming where Tencent and NetEase (NTES US, Buy) hold the lead and PUGVs (professional user generated videos) in which Bilibili (BILI US, Neutral) is a leader.

Tomato free novel (TFN) app growth slows, while Hongguo drama app gains traction

Questmobile reports that the DAU of TFN app (owned by Bytedance) reached 144mn in July, a 6% increase from the previous year, decelerating from 8% y-y growth in June. We think this is likely a sign of nearing the ceiling of its user growth after years of rapid expansion. The intensifying competition for users' time spent, particularly from AI-animated dramas, likely also played a role for the dwindling momentum of a literature app, in our view.

In contrast, the DAU of Hongguo short drama reached 168mn in July, surpassing the combined DAU of all the top four long-form video apps - Tencent Video (owned by Tencent), Youku [owned by Alibaba (BABA US, Buy)], Mango TV (300413 CH, Not rated) and iQIYI (IQ US, Neutral). Despite already having a huge user base, Hongguo's growth shows no signs of abating with an 8% m-m increase and a breathtaking 107% y-y increase. Hongguo recently promotes another app called Hongguo AI-animated drama that is mainly dedicated to AI-animated dramas. This app appeals to be gaining user traction quickly with a 37% m-m increase in DAU to 16mn.

Bytedance might manage its app portfolio holistically – while time spent on one of its apps (e.g. TF) slows, it will relocate the users and their time spent into its other apps.

Internet giants shifting attention from AI chat bots to AI office agents

Questmobile data shows that Doubao (owned by Bytedance) maintained its leadership in China's AI chatbot vertical with a DAU of 168mn. However, its sequential DAU growth decelerated to flat m-m in July, ending its user growth streak since Aug 2025. In our view, this signals a cooling-down of competition in the AI chatbot field. Instead, China internet

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See Appendix A-1 for analyst certification, important disclosures and the status of non-US analysts.

giants are shifting focus toward AI office agents. Alibaba has consolidated QoderWork, MuleRun, and Wukong into QwenWork, targeting the conversion of enterprise workflows accessed through DingTalk into model and cloud consumption. Tencent has been marketing WorkBuddy as its flagship general-purpose office agent, gradually integrating it with its social and office apps including Weixin, Wecom, Tencent Docs, and Tencent Meeting. Bytedance has implemented a wide-ranging restructuring, combining Feishu's product team with Doubao and merging Feishu's sales team with Volcano Engine. Doubao Work was officially launched on August 25 as Bytedance's new AI office agent. These AI office applications differ from traditional office applications in that they are capable of autonomously completing cross-application tasks for users thanks to the equipped foundation models.

Within traditional workplace applications, according to Questmobile, DingTalk (unlisted, owned by Alibaba) owned the largest DAU scale at 77mn (down 1% y-y) in July, while WeCom sustained solid DAU growth of 9% to 72mn, further narrowing its gap with DingTalk. Feishu exhibited the strongest DAU growth at 51% to 10mn in July 2026, likely due to its smaller user scale.



Overview of leading Chinese apps

Much of the traffic flow in July 2026 was dominated by apps owned by Bytedance, Tencent, Baidu (BIDU US, Buy), and Alibaba. In particular, Bytedance's apps took five spots among the Top-20 in terms of both monthly active users (MAU) and time spent share in July, according to QuestMobile. ByteDance's Douyin recorded a 19.4% share in terms of time spent by Chinese mobile users, surpassing Tencent's Wechat app for the first time to claim the top spot. Douyin Lite (unlisted, owned by Bytedance) ranked third, with a 6.3% time-spent share.

Fig. 1: Top-20 apps in China, by MAU and time spent – July

Top 20 Apps in MAU: MAUs change and penetration

App Name	Rank M-M chg	Penetration	Penetration Y-Y	Penetration M-M
WeChat	-	90.2%	2.7ppt	0.2ppt
Douyin	-	80.6%	7.2ppt	0.2ppt
Taobao	-	75.5%	-2.3ppt	-1.2ppt
Alipay	-	73.9%	-0.1ppt	-0.3ppt
Amap	-	73.2%	-0.6ppt	1.9ppt
Pinduoduo	-	55.5%	-1.7ppt	0.6ppt
Sogou Keyboard	-	54.4%	3.6ppt	-0.1ppt
Baidu	↑	50.3%	-5.3ppt	0.3ppt
QQ	↑	49.5%	-1.4ppt	0.6ppt
JD	↓	49.1%	2.0ppt	-3.6ppt
Baidu Maps	-	44.3%	-3.0ppt	0.2ppt
Meituan	-	41.3%	-0.3ppt	0.6ppt
Baidu Keyboard	-	38.6%	-0.7ppt	-0.1ppt
Weibo	-	37.1%	-1.5ppt	-1.5ppt
Kuaishou	-	35.4%	-1.9ppt	0.9ppt
Doubao	-	31.2%	19.5ppt	1.4ppt
Red Fruit Free Short Drama	↑	30.8%	12.7ppt	2.1ppt
Toutiao	↓	29.1%	-2.0ppt	0.0ppt
Douyin Lite	↑	26.1%	2.9ppt	0.4ppt
QQ Browser	↓	25.4%	-7.2ppt	-0.7ppt

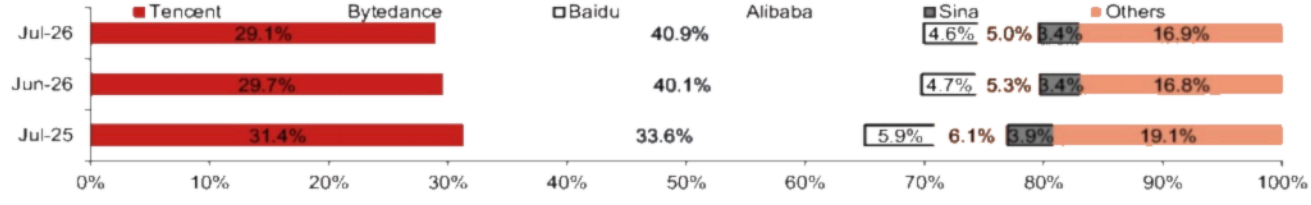
Time spent share for top 20 Chinese mobile apps in July

App Name	Rank M-M chg	Time spent share	Time spent share Y-Y	Time spent share M-M
Douyin	↑	19.4%	3.0ppt	0.4ppt
WeChat	↓	18.8%	-1.1ppt	-0.5ppt
Douyin Lite	-	6.3%	0.9ppt	0.0ppt
Red Fruit Free Short Drama	-	5.0%	2.9ppt	0.4ppt
Kuaishou	-	3.9%	-1.1ppt	0.1ppt
Sogou Keyboard	-	3.0%	-0.1ppt	-0.1ppt
Toutiao	-	2.6%	-0.5ppt	-0.1ppt
Rednote	-	2.5%	-0.1ppt	0.1ppt
Kuaishou Express	-	2.3%	-0.4ppt	0.1ppt
Pinduoduo	-	2.2%	0.0ppt	0.0ppt
Baidu Keyboard	↑	2.0%	0.0ppt	0.1ppt
Fanqie Free Novels	↓	1.9%	0.0ppt	0.0ppt
Weibo	-	1.8%	-0.3ppt	0.0ppt
Bilibili	↑	1.7%	0.0ppt	0.0ppt
Taobao	↓	1.5%	-0.3ppt	-0.2ppt
Baidu	-	1.4%	-0.6ppt	-0.1ppt
Sina News	-	1.4%	-0.1ppt	0.0ppt
Honour of Kings	↑	1.3%	0.1ppt	0.1ppt
Alipay	↓	1.2%	0.1ppt	0.0ppt
Tencent News	-	1.0%	-0.1ppt	0.0ppt

Source: QuestMobile, Nomura research

Among the Top-50 apps, which accounted for ~93% of the total mobile time spent in China during July, we note that the Bytedance camp gained time-spent share on a y-y basis, which rose from 33.6% in July 2025 to 40.9% in July 2026, surpassing Tencent camp's 29.1%. Sequentially, Bytedance's time-spent share was up 0.8pp m-m.

Fig. 2: Time-spent share of various internet camps among the Top-50 apps in China



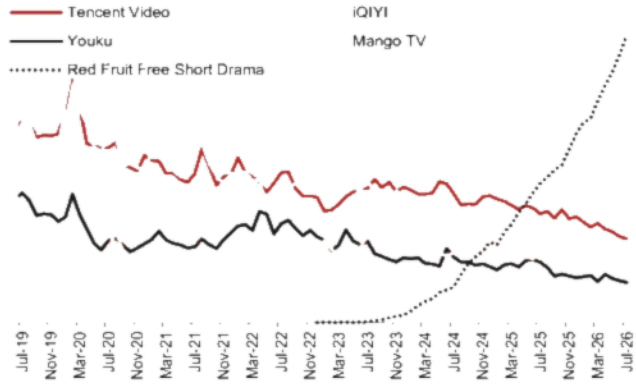
Source: QuestMobile, Nomura research

Long-form vs short-form dramas

Long-form video apps remained weak in July. Despite iQIYI (IQ US, Neutral) commending the largest MTS across long-form video apps, its MTS reduced 27% in July, dragged by a 20% decline in DAU. Besides, the MTS of Tencent Video (owned by Tencent)/Youku (owned by BABA)/Mango TV (300413 CH, Not rated) recorded declines of 31%/47%/24% y-y in July, partly weighed down by 11%/34%/15% declines in DAU.

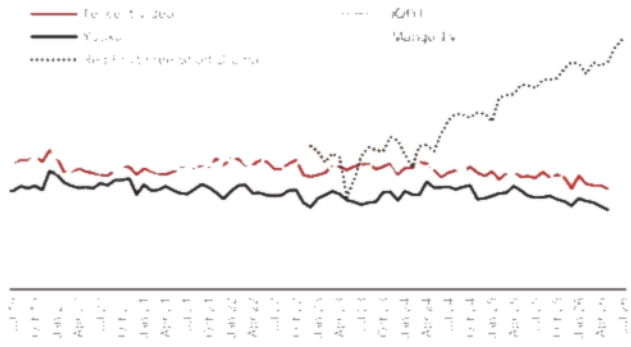
The dominant short-form drama app – Red Fruit Free Short Drama (owned by Bytedance)– kept its strong growth trend with an MTS increase of 157%, backed by 107% growth in DAU and 24% growth in DTSD.

Fig. 3: DAUs of long-form vs short-form dramas apps



Source: QuestMobile, Nomura research

Fig. 4: Average daily time spent per user

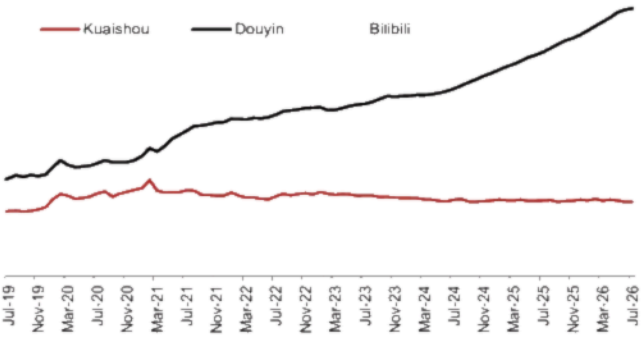


Source: QuestMobile, Nomura research

Short video

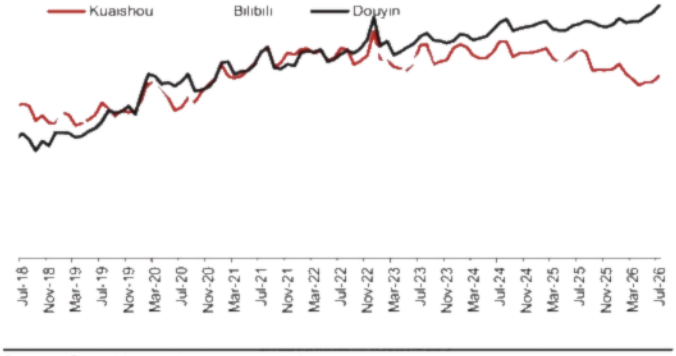
In July, Douyin maintained its solid growth momentum in terms of MTS, at 29% y-y, driven by 19% growth in DAU and 8% growth in DTSD. Total time spent for Bilibili (BILI US, Neutral) recorded 8% y-y growth in July, driven by 6% y-y growth in DAU and 2% growth in DTSD. However, Kuaishou (1024 HK, Neutral) continued its relatively soft performance, with a decline of 15% y-y in MTS, mainly dragged by a 13% y-y decline in DTSD.

Fig. 5: DAUs of short video apps



Source: QuestMobile, Nomura research

Fig. 6: Average daily time spent per user



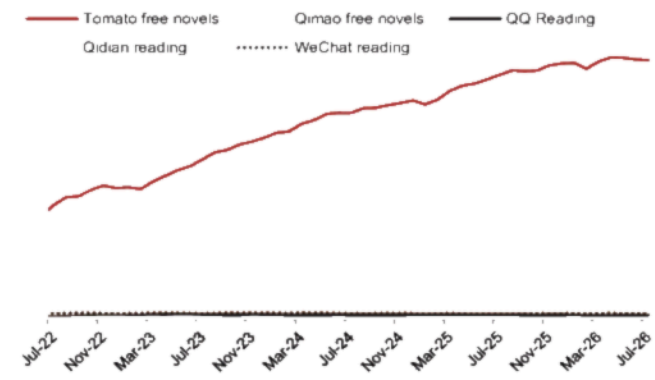
Source: QuestMobile, Nomura research

Online reading

The MTS of the free reading app leader Tomato Free Novels (unlisted; owned by ByteDance) recorded 8% y-y growth in July, mainly backed by an increase of 6% y-y in DAU. Another free reading app, Qimao Free Novels (unlisted) continued its downward trend with a 43% y-y decline in total time spent, dragged by 27% and 23% y-y declines in DAU and DTSD, respectively.

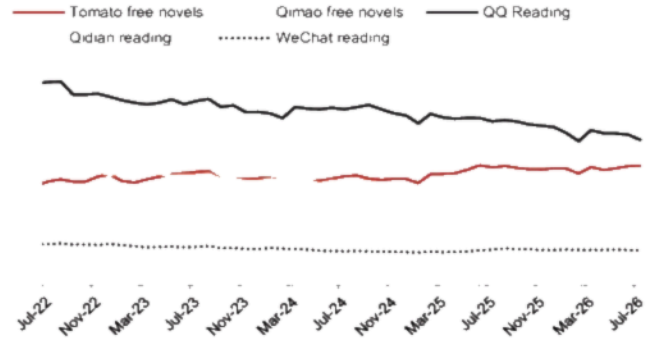
Paid reading apps owned by China Literature (772 HK, Neutral), i.e., Qidian reading and QQ reading also appeared soft user engagements, recording respective declines of 9% and 6% on a y-y basis in DAU during the month, and their DTSDs were down by 12% and 11% y-y, respectively.

Fig. 7: DAU of online reading platforms



Source: QuestMobile, Nomura research

Fig. 8: Average daily time spent per DAU of online reading platforms

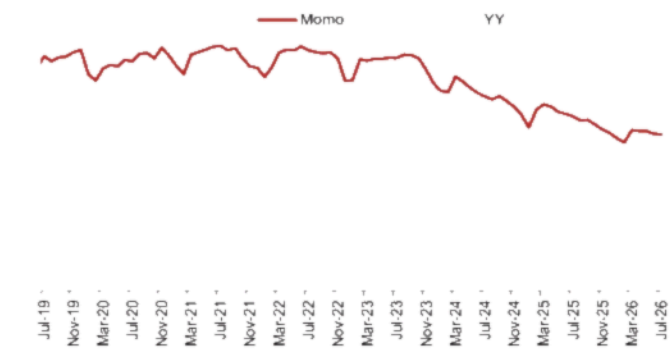


Source: QuestMobile, Nomura research

Live broadcasting

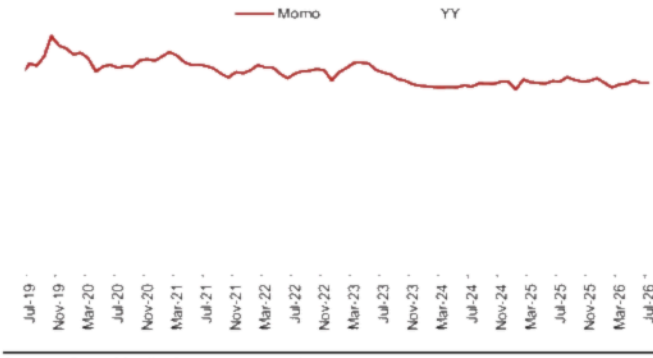
Live broadcasting show apps maintained their y-y downward trend in MTS in July. However, Momo's (MOMO US, Not rated) overall user engagement appeared more resilient compared to YY (owned by Baidu). The MTS of Momo dropped 11% y-y in July 2026, mainly owing to 10% decline of DAU. Comparably, YY's MTS reduced 15% y-y, mainly dragged by a 14% decline in DTSD.

Fig. 9: DAUs of live broadcasting show apps



Source: QuestMobile, Nomura research

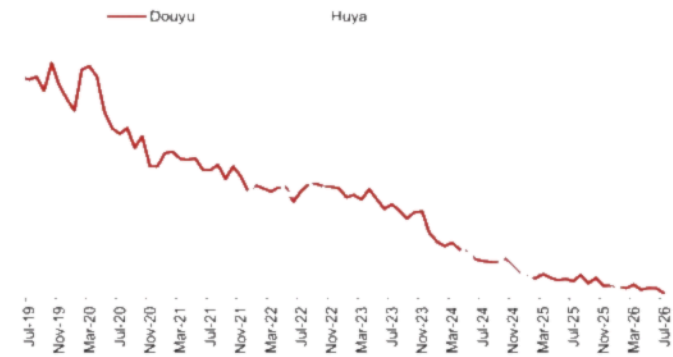
Fig. 10: Average daily time spent per user



Source: QuestMobile, Nomura research

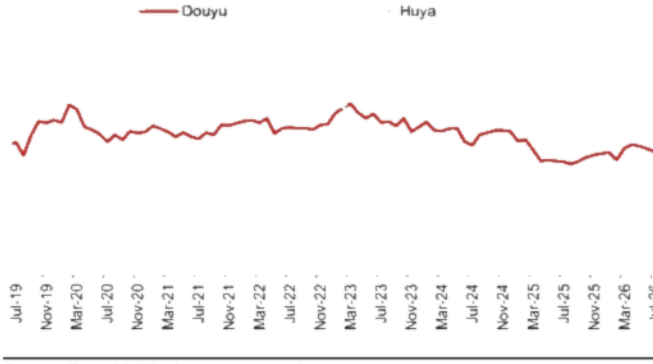
For game live broadcasting apps, the MTS scale of Huya (HUYA US, Not rated) was 1.5x that of Douyin (DOYU US, Not rated) in July. However, both faced downward pressure. The MTS for Huya recorded an 18% decline in July, mainly dragged by a 17% y-y decline in DAU. The MTS for Douyu recorded a 9% y-y decline in July, dragged by a 16% y-y decline in DAU, offsetting 9% y-y growth in DTSD.

Fig. 11: DAUs of game live broadcasting apps



Source: QuestMobile, Nomura research

Fig. 12: Average daily time spent per user



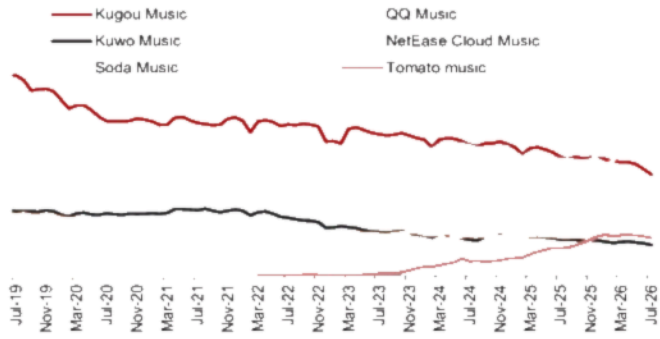
Source: QuestMobile, Nomura research

Music

The y-y decline in DAU continued for most part of the music universe, except for Soda Music and Tomato Music (both owned by ByteDance), which recorded 70% and 37% y-y growth, respectively, in July. Against the competition from the emerging Soda Music and Tomato Music, NetEase Cloud Music (9899 HK, Not rated) remained relatively stable user scale, with flat y-y growth of DAU in July. However, the music apps [owned by TME (TME US, Neutral)], i.e. QQ Music/Kugou Music/Kuwo Music were experiencing user churn, down 5%/15%/15% y-y in terms of DAU in July (as shown in *Fig. 13*).

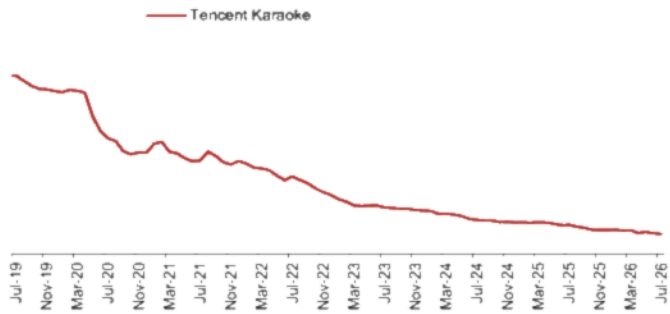
Tencent Karaoke maintained its y-y downward trend in MTS, with a 21% y-y decline, mainly dragged by a 32% y-y drop in DAU, offsetting 16% y-y growth in DTSD in July (as shown in *Fig. 14*).

Fig. 13: DAUs of music streaming apps



Source: QuestMobile, Nomura research

Fig. 14: DAUs of online karaoke app

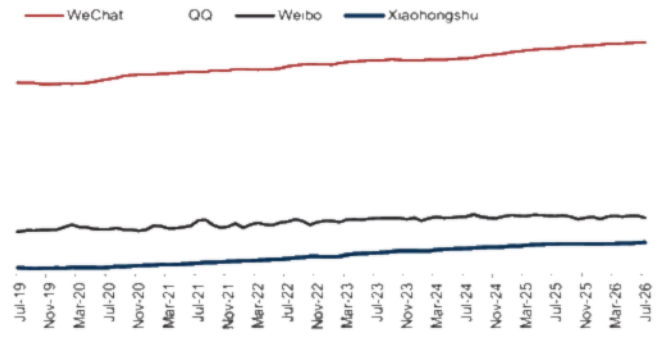


Source: QuestMobile, Nomura research

Social

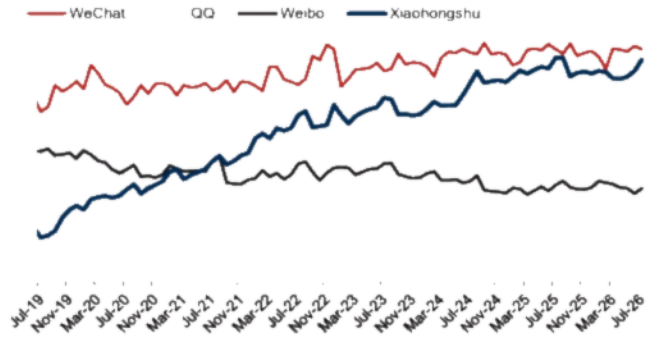
The MTS of Xiaohongshu (unlisted) recorded 5% y-y growth in July, mainly driven by 6% y-y growth in DAU, driven by the exclusive online streaming right secured for the FIFA World Cup 2026 in China, in our view. The MTS of Weibo (WB US, Neutral) declined 7% y-y in July, dragged by a 4% decline in DTSD and a 3% drop in DAU. Within Tencent's social ecosystem, QQ maintained its downward trend in MTS, with a 4% y-y decline, while WeChat recorded 3% y-y growth in terms of total time spent in July.

Fig. 15: DAUs of social apps



Source: QuestMobile, Nomura research

Fig. 16: Average daily time spent per user

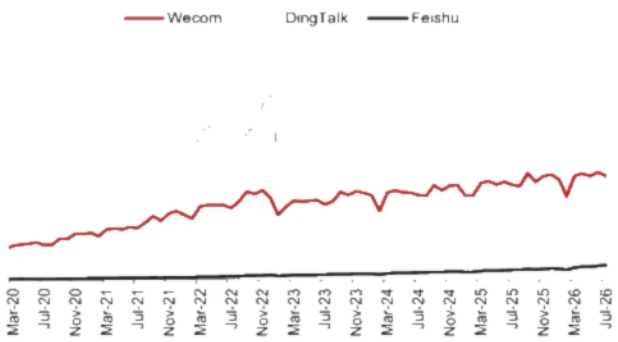


Source: QuestMobile, Nomura research

Office apps

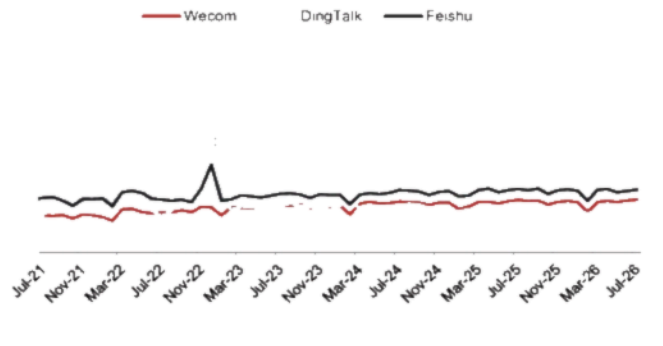
Within the office apps vertical, the DAU of Feishu (owned by Bytedance) and Wecom (owned by Tencent) recorded 51% y-y and 9% y-y growth, respectively, in July, while Ding Talk (owned by BABA) recorded 1% y-y decline. However, Ding Talk owned the largest DAU base at ~77mn, which was 1.1x and 7.7x that of Wecom and Feishu, respectively. For Feishu, the DTSD was at 14.8 minutes (down 1% y-y), followed by Wecom's 12.4 minutes (flat y-y) and DingTalk's 9.9 minutes (down 5% y-y), as per QuestMobile data.

Fig. 17: DAUs of office business apps



Source: QuestMobile, Nomura research

Fig. 18: Average daily time spent per user

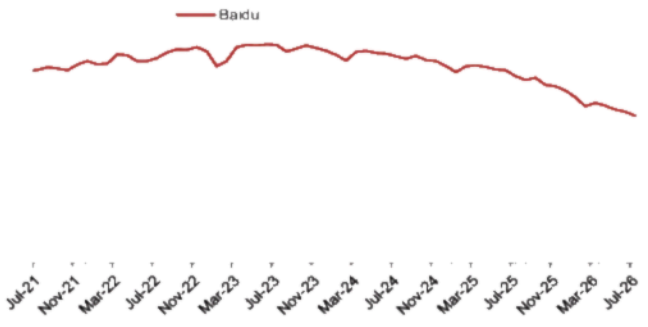


Source: QuestMobile, Nomura research

Search

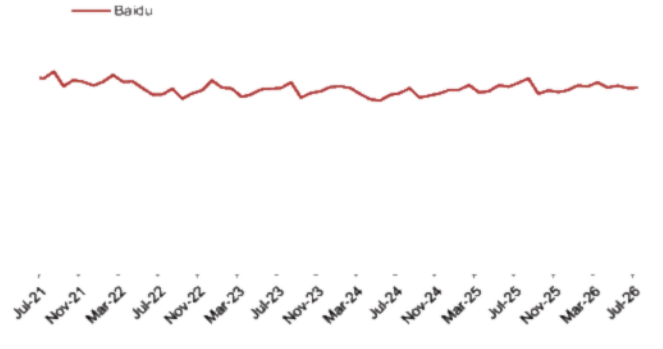
The Baidu app, despite being a dominant search engine in China, witnessed a 23% y-y decline in MTS during the month, mainly dragged by a 21% y-y decline in DAU.

Fig. 19: DAU of Baidu app



Source: QuestMobile, Nomura research

Fig. 20: Average daily time spent per user



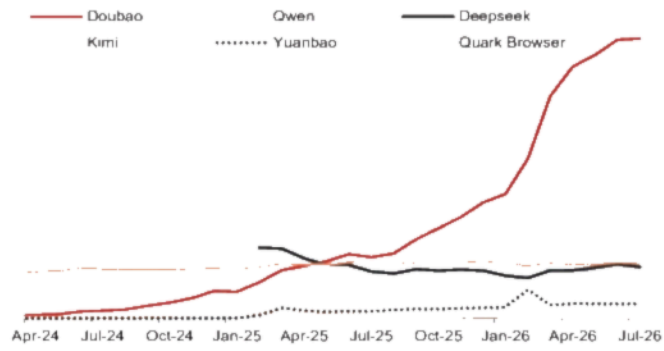
Source: QuestMobile, Nomura research

AI tools

The DAU of Doubao (owned by ByteDance) ranked first in July at 168mn (according to QuestMobile data), representing 3.6x y-y and flat m-m growth. This was followed by Quark Browser at 33mn (down 1% y-y and down 2% m-m), Deepseek at 31mn (up 9% y-y and down 5% m-m), and Qwen (owned by Alibaba) at 28mn (up 90x y-y and down 4% m-m).

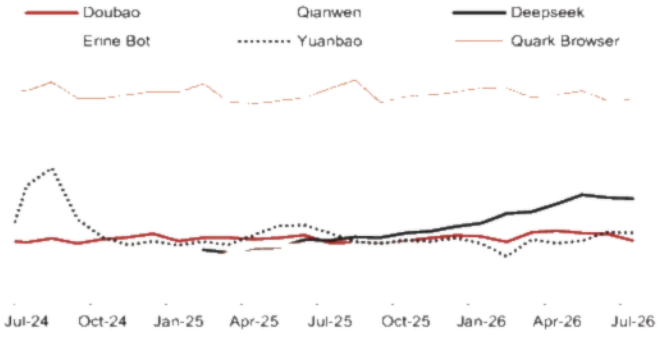
In terms of DTSD, Quark Browser recorded the highest time spent at 32 minutes in July (down 5% y-y and flat m-m). Deepseek ranked the second at 16.5 minutes (up 66% y-y and down 1% m-m), followed by Kimi's 12.5 minutes (up 93% y-y and flat m-m).

Fig. 21: DAUs of AI apps



Source: QuestMobile, Nomura research

Fig. 22: Average daily time spent per DAU of AI apps

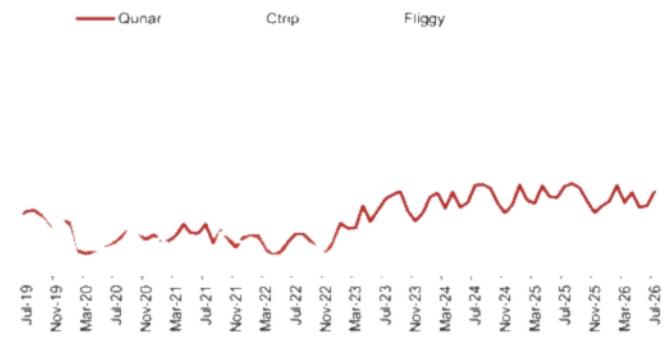


Source: QuestMobile, Nomura research

Online travel

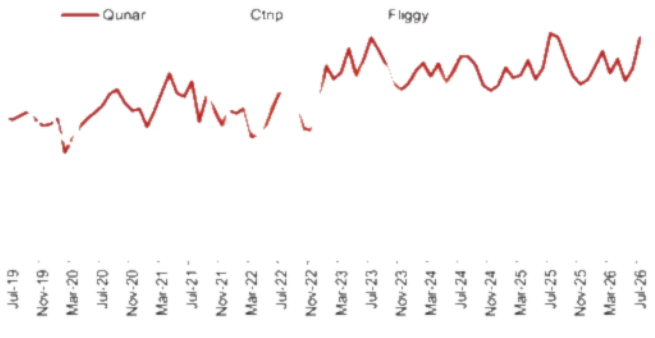
Among online travel apps, TRIP.com's (TCOM US, Neutral) domestic apps, Ctrip and Qunar, and Fliggy (unlisted, owned by BABA) recorded 16%, 8% and 5% y-y declines in MTS in July, respectively, mainly dragged by corresponding 9%, 6% and 3% y-y declines in DAU. In terms of DTSD, Ctrip, Qunar and Fliggy recorded 9%/2%/3% y-y declines in July.

Fig. 23: DAUs of online travel apps



Source: QuestMobile, Nomura research

Fig. 24: Average daily time spent per user



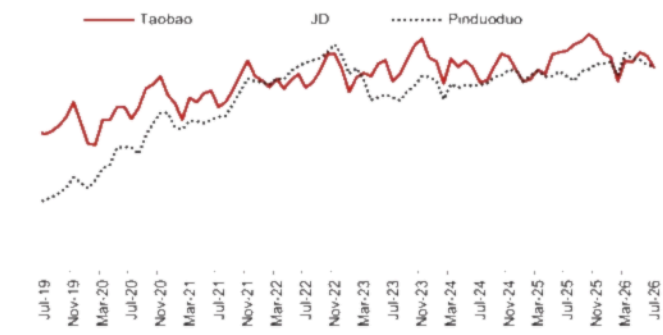
Source: QuestMobile, Nomura research

E-commerce

Pinduoduo (PDD US, Neutral) app and Alibaba's Taobao app were the top-two e-commerce names in terms of users and total time spent. Pinduoduo's DAU recorded 5% y-y growth in July, mainly backed by 19% y-y growth in the number of casual users (daily time spent <1 minute) and the number of hardcore users (daily time spent >1 minute) recorded 2% y-y growth. However, Taobao's DAU decrease of 8% y-y was dragged by an 11% decline in the number of hardcore users, offsetting 3% y-y growth in the number of casual users. JD app's DAU increased 1% y-y, backed by a 28% y-y growth in the number of casual users, offsetting 7% y-y decline in the number of hardcore users.

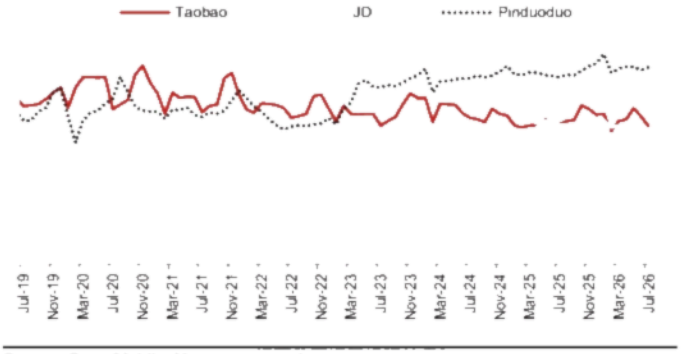
In terms of DTSD, PDD delivered 5% y-y growth in July, while Taobao and JD app recorded 1% and 4% y-y declines, respectively.

Fig. 25: DAUs of China e-commerce apps



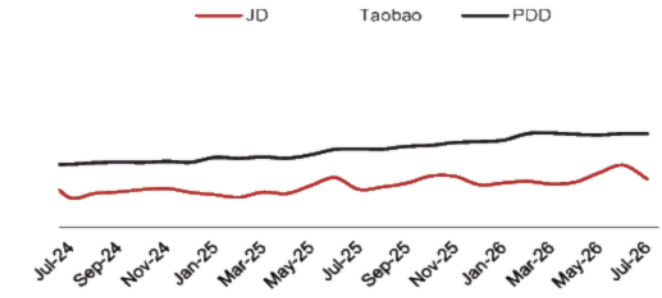
Source: QuestMobile, Nomura research

Fig. 26: Average daily time spent per user



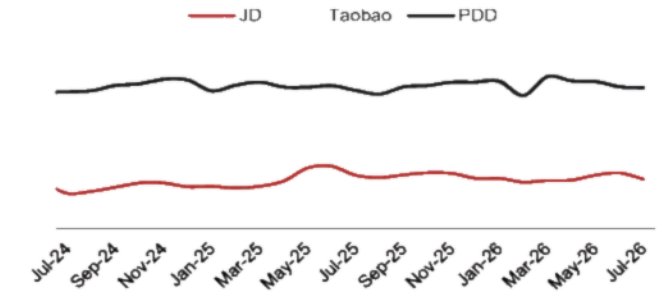
Source: QuestMobile, Nomura research

Fig. 27: Number of users with daily time spent at <1 minute



Source: QuestMobile, Nomura research

Fig. 28: Number of users with daily time spent at >1 minute

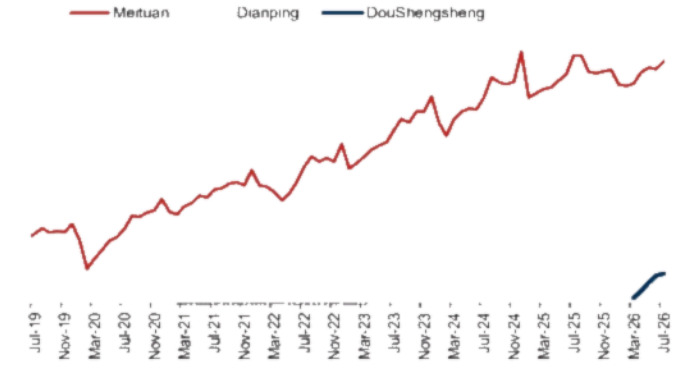


Source: QuestMobile, Nomura research

O2O

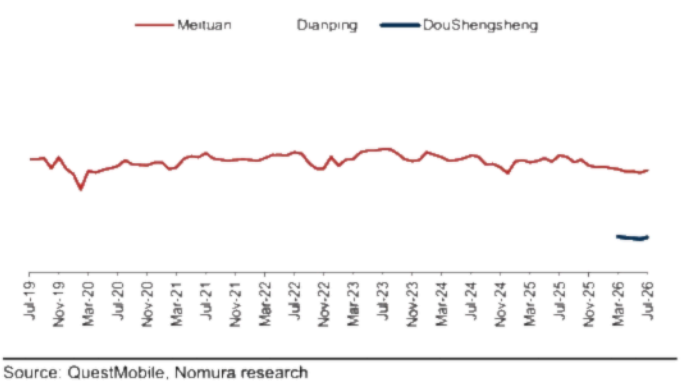
The Meituan app recorded a 15% y-y decline in MTS in July, mainly dragged by a 13% decline in DTSD. Dianping app (owned by Meituan) recorded a 6% decline in MTS, dragged by a 21% y-y decline in DTSD, offsetting 19% growth in DAU.

Fig. 29: DAUs of Meituan and Dianping



Source: QuestMobile, Nomura research

Fig. 30: Average daily time spent per user

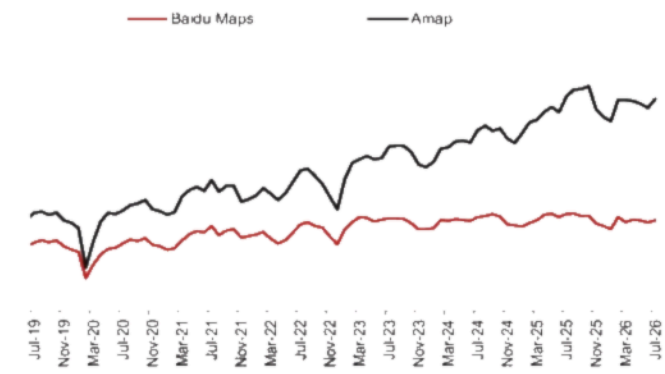


Source: QuestMobile, Nomura research

Mobile map apps

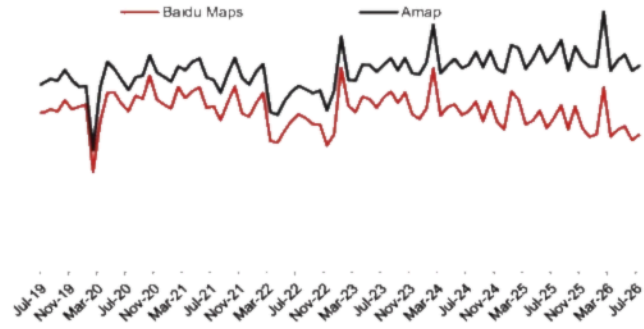
Total time spent on Baidu Maps declined 17% y-y in July, dragged by an 11% decline in DTSD and a 7% decline in DAU. The MTS of Amap (owned by BABA) fell 7% y-y in July, dragged by a 6% y-y decline in DTSD and a 1% y-y decline in DAU.

Fig. 31: DAUs of Baidu Maps and Amap



Source: QuestMobile, Nomura research

Fig. 32: Average daily time spent per user



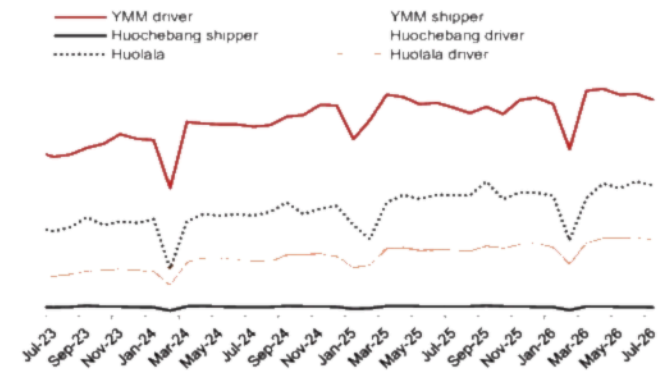
Source: QuestMobile, Nomura research

Digital freight apps

On the shipper side, the MTS of YMM Shipper (owned by Full Truck Alliance, FTA [YMM US, Buy]) and Huolala (unlisted) recorded 9% y-y and 16% y-y growth, respectively, mainly driven by 4% and 8% y-y growth in DAU. However, Huochebang Shipper (owned by FTA) recorded a 5% y-y decline in July, dragged by a 6% y-y decline in DAU, offsetting 1% y-y growth in DTSD.

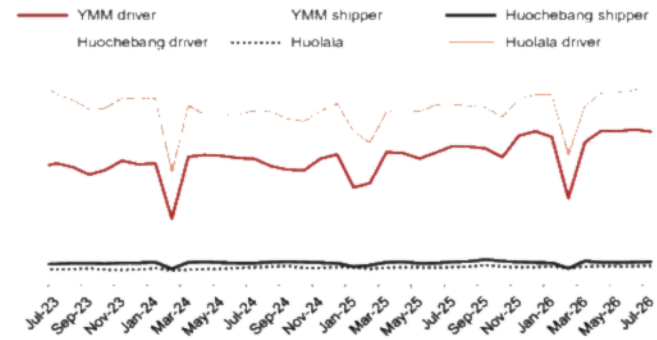
On the driver side, YMM Driver (owned by FTA) recorded 15% y-y growth in MTS in July, mainly driven by a 10% rise in DTSD; Huolala Driver's (unlisted) MTS increased 27%, mainly thanks to 16% y-y growth in DAU and 10% y-y growth in DTSD. While Huochebang Driver (owned by FTA) recorded a 5% y-y decline in MTS, dragged by an 11% y-y decline in DAU, offsetting 6% y-y growth in DTSD.

Fig. 33: DAUs of digital freight apps



Source: QuestMobile, Nomura research

Fig. 34: Average daily time spent per user

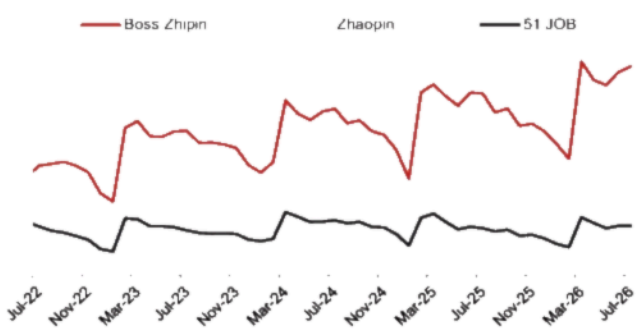


Source: QuestMobile, Nomura research

Online recruitment apps

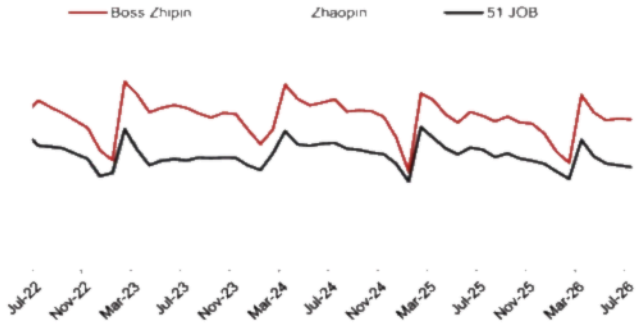
Boss Zhipin app (owned by Kanzhun [BZ US, Not rated]), one of the leading players in the online recruitment industry, recorded 12% y-y growth in MTS in July, driven by 15% y-y growth in DAU, offsetting a 2% y-y decline in DTSD. However, the MTS of Zhaopin (unlisted) and 51Job (unlisted) decreased a respective 9% and 11% y-y in July, primarily dragged by corresponding declines of 7% and 15% in DTSD.

Fig. 35: DAUs of online recruitment apps



Source: QuestMobile, Nomura research

Fig. 36: Average daily time spent per user



Source: QuestMobile, Nomura research